

Visitor Attitude and Market Survey
for
Planning Community-based Tourism Initiatives in Rural Ladakh¹

Prepared by:

The Snow Leopard Conservancy
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1. Introduction, Scope of Survey and Objectives

Bounded by two of the world's highest mountain ranges, the Great Himalaya and the Karakoram, Ladakh is a land of exhilarating mountain landscapes, rocky gorges and a unique cultural heritage. It is also home to distinctive wildlife such as the snow leopard, blue sheep and Tibetan wild ass, all living in a unique high altitude desert ecosystem. Not surprisingly, Ladakh is becoming a sought after tourist destination for international and domestic visitors alike. Over the past two decades tourism has grown substantially, although erratically, with both positive and less positive results for Ladakh's environment and people. People are recognizing that it is important to act now and engage in an informed dialogue in order to conserve the natural and cultural resources on which the future of tourism and related incomes depend. The Snow Leopard Conservancy (SLC) is working in collaboration with local communities and non-governmental organizations to foster co-existence between people and predators like the endangered snow leopard by reducing livestock depredation losses and improving household incomes in environmentally friendly, socially responsible and economically viable ways. Well-balanced tourism is one income generating option.

In May 2001, SLC, The Mountain Institute (TMI) and the Ladakh Ecological Development Group (LEDeG) convened a 3-day workshop in Leh to explore community-based ecotourism (CBT) opportunities within the context of rural Ladakh. Workshop participants included representatives from the private sector (including travel agents and guesthouse operators), government, NGOs, and several rural communities. The participants emphasized the importance of protecting and balancing Ladakh's unique cultural, social and environmental heritage through a set of objectives that:

- Conserve the areas' natural and cultural heritage
- Generate economic benefits for rural populations in ways that are environmentally and socially responsible (including greater income/revenue, a more equitable distribution of benefits and more skilled ecotourism service providers)
- Enhance education and awareness of the environment and culture among host and visitors to provide quality experiences for both;

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- Strengthen participation and decision-making in tourism of rural Ladakhis, especially among marginal groups like women; and
- Influence and introduce policies/schemes that benefit the rural tourism industry, e.g. incentives, subsidies, regulations, site focus

Action Plans were outlined for promoting CBT development in Ladakh, including the formation of a Pony Operators Organization in Hemis National Park and a concept for encouraging traditional home-stays. The pony operators' action plan identified specific measures for better linking tour and pony operators, for improving the profit margin, and for offering management training to the pony owners. The village-based home-stay sought to maintain the local style way of life, emphasize simple Ladakhi food, and maintain Ladakh's rich traditional cultural environment. Other guidelines highlighted environmentally friendly eco-tourism concepts, and promoting a minimum capacity of 2-beds. Recommendations related to policy and economic incentives, such as government or bank subsidies, loans and grants, along with a fair and competitive pricing system, were also formulated.

A common mistake made by many CBT proponents is to assume a market exists for a particular set of activities, and all one needs do is to provide the necessary facilities for "tourists to come flocking." However, this frequently proves to be erroneous, thus highlighting the need for adequate baseline surveys targeting visitor attitudes, interests and their willingness to pay before investing funds on infrastructure or skills training. Therefore, we organized a tourist questionnaire survey with the following specific objectives:

- Profile a representative sample of tourists along the Markha trekking circuit in Hemis National Park and other selected destinations, in terms of their nationality, age and economic status, group size and other important characteristics;
- Seek respondent's attitudes concerning the visitor's experience, accommodation preferences, and his or her willingness to pay for, or otherwise ensure greater benefit accrues to the local rural communities from environmentally sound and socially responsible tourism.

2. Methods

A questionnaire was developed with the assistance of persons knowledgeable in CBT. Staff and volunteers from SLC, LEDeG and WWF-Ladakh administered the questionnaires during July - August 2001. Nearly all of the tourists or groups encountered between August 1-25 in the Markha Valley were interviewed. Tourists visiting the Changtang and the high-altitude lakes of Tso Morari and Tsokar by jeep were interviewed by staff from WWF and LEDeG. The Hemis-Shukpachan area was also surveyed by LEDeG. Whenever large groups were encountered, we selected one or two of the members at random and asked them to complete the questionnaire.

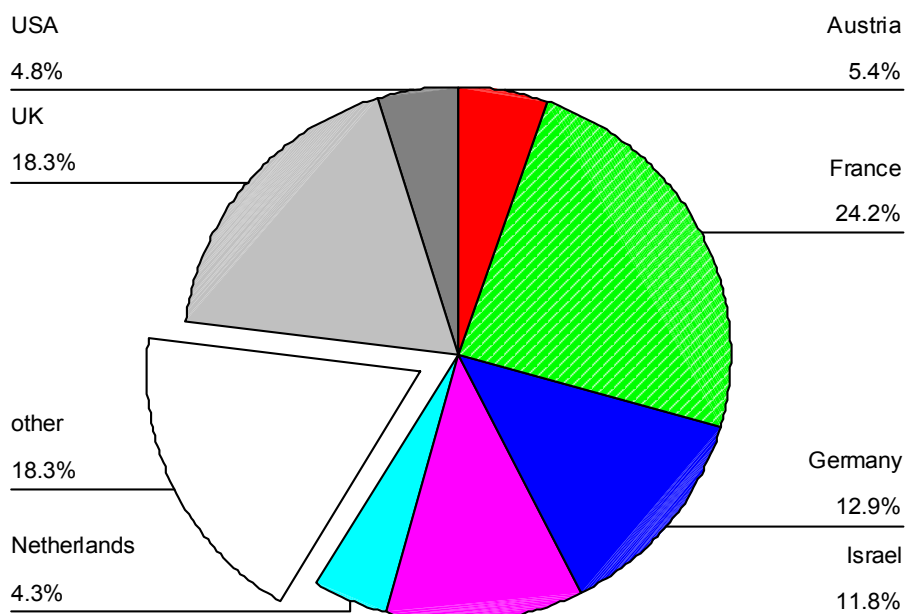
All completed forms were collected and reviewed for content and completeness. Twenty-five were rejected as being non-representative of our target audience. These had been completed by high-school students from a large group (BSES), and their understanding of current prices and services appeared to be very limited. All remaining survey forms were reviewed for completeness and then entered into SPSS, a statistical software package. Over 75 variables were developed and the data screened for possible entry errors, and in the case of statistical tests, to identify and remove any outliers or to ensure compliance with the key assumptions of the particular test.

3. Surveys Results and Findings

The sample size totaled 186 respondents, of which 63 (34%) were interviewed along the Markha circuit, 54 (29.1%) in Korzok or the Karnak area, and the remainder at various places within a day's drive of Leh. Tourists visiting Rumbak and the popular Stok route appear to have been under-sampled.

Visitor Profile: Over 80% of the visitors we interviewed came from seven countries: France, United Kingdom, Germany, Israel, Austria, USA, and the Netherlands (Figure 1). The remainder represented 11 countries (see Appendix 2 for details).

Figure 1: Country of Origin of the Visitors Interviewed



Males comprised 53.4% and females 46.6% of the 176 respondents who reported their gender. The age distribution of sampled visitors is shown in Figure 2, with most being between 20 and 45 years old. This was their first visit to Ladakh for the vast majority of respondents (84%). Another 4.3% had visited once before, 5.9% had made two prior trips, and 2.7% reported making three or more visits to the region (N = 185). One person claimed to have visited Ladakh 10 times. The average length that each person (N = 160) stayed was 23.7 days (standard deviation = 18.3; minimum = 3 maximum = 180 days).

While students stayed slightly longer than did other visitors (27.6 days versus 22.1 on average), this difference was not statistically significant. Twenty-five percent stayed two weeks or less, 49% stayed for 18 days or less, 75% stayed less than 30 days and 90% reported staying no longer than 42 days.

As Figure 3 shows, over 50% of the tourists sampled traveled in groups of two to five persons, while only 5.5% trekked on their own. Thirty-eight respondents belonged to groups of 11 or more persons. Eighty-one percent of all groups of 6 or more persons came from the three countries of France (43.8%), Germany (19.2%) and the UK (17.8%). Tourists traveling in a group of two persons were primarily from Britain (19.7%), Israel (11.5%), USA (11.5%), Austria (9.8%), and Germany and France (each comprising 6.6%). Groups of 3-5 persons came from Israel (27.1%), France (18.8%), Britain (12.5%), Germany (10.4), and Austria (8.3%), and accounting for 77% of all groups recorded of this size.

Respondents reported their profession as student (30.1%), private employee (22.6%), government worker (15.6%), business owner (8.1%), and “other” (22.6%). Four persons or 2.2% of the sample (N = 186) omitted to indicate what their profession was. The students are primarily from Israel (31.5%), Britain (27.8%), Germany (9.3%), Denmark (7.4%) and France (5.6%).

Figure 2: Age of Respondents (N = 182)

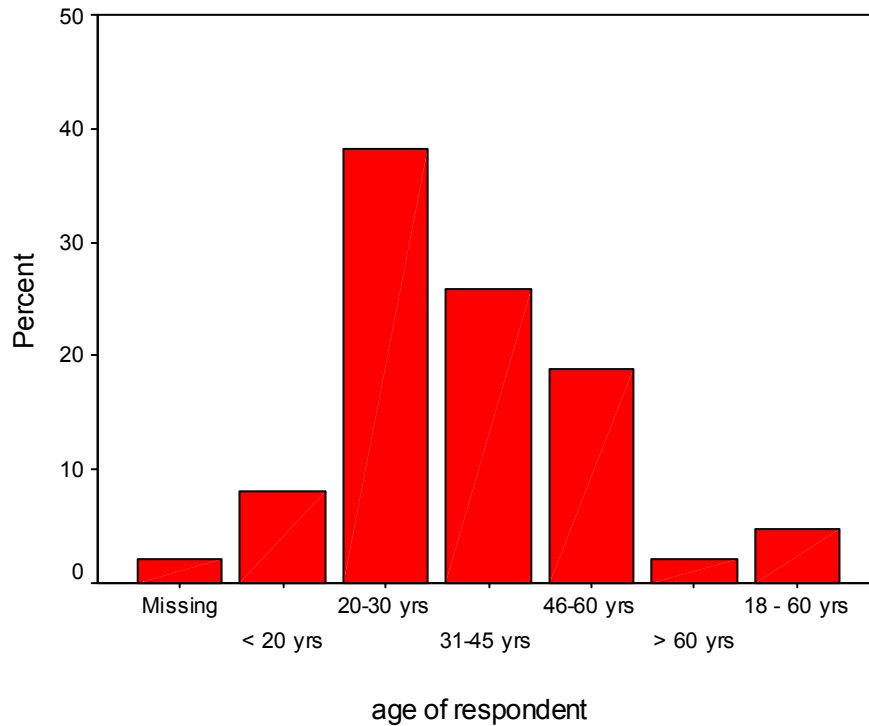
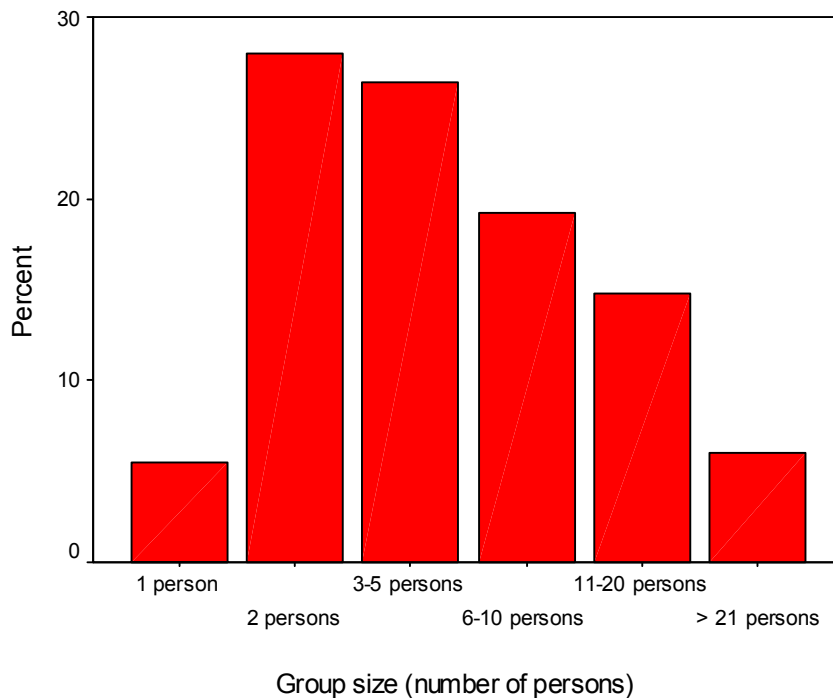


Figure 3: Group Size (N = 182)



Visitor Experience and Interests: When asked what motivated their trip, 74% indicated a desire to experience or appreciate nature, 70.4% sought culture, 57% came for the adventure and 33.3% for what they perceived as a unique destination.

Most respondents (56%) reported their trip had been arranged independently (known in the trade as a FIT), while 32% arranged the trek from overseas (presumably in most instances from their country of residence). The remainder formed or joined a group upon their arrival in Leh (presumably by word of mouth or by following up notices posted at guesthouses or restaurants). More men than women traveled as FITs (61% versus 39%, N = 94), while more women than men formed a group after arrival in Ladakh (70% versus 30%, N = 20). Overseas booking rates of each gender were very similar.

In tallying sites already visited or next on the list to be visited, we noted the following sites or attractions in decreasing order of importance (i.e., most visited sites list first): Markha circuit; Likir-Temisgam trek; monasteries; Changtang (for trekking); Zanskar; Alchi-Lamayuru; Nubra; Tsokar/Tso Morari (by jeep); and Spitok-Stok trek -- the later evidently under-represented in our sample.

Tourists were overwhelmingly supportive of tourism which benefits local communities: Of the 186 respondents, 154 (83%) were in favor compared to only 7 (4%) against, with 25 respondents (13%) expressing no opinion. Numerous suggestions were given for how local communities should be benefited, which are summarized in Table 1.

Table 1: How Local Communities Should Benefit from Tourism

Type of Benefit	No of Respondents	Percent
Economic	49	54.4
Cultural exchange	17	18.9
Development & infrastructure improvement	8	8.9
Hygiene & sanitary conditions	4	4.4
Other	12	13.3
Totals	90	100

Table 2: Estimated Daily Expenditures (in Indian rupees; \$ 1 US = 46 IRs) (N = 173)

Daily Expenditure (Indian rupees)	Frequency	Percent
> 2,000	12	6.9
1000-2000	30	17.3
500-1000	38	22.0
250-500	39	22.5
100-250	45	26.0
Expenditure not specified	9	5.2
Total	173	100.0

Average daily expenditures, presumably mostly incurred while on trek, are shown in Table 2 (see recommendation section for suggested improvements to questionnaire). There was no significant

difference between gender in terms of the visitor's daily expenditure. Not surprisingly, students reported spending significantly less than professionals (Chi-Square 12.25, df 3, $p < 0.007$).

Table 3 indicates the different types of accommodation preferred by respondents while trekking or staying in rural areas. Nearly 40% of respondents are interested in staying in a traditional village house, while only 10% are seeking deluxe accommodation. The high selection of "personal tents" probably reflects the present dominance of this form of accommodation.

Table 3: Type of Accommodation Preferred (N = 182)

Type of Accommodation	Frequency	Percent
Deluxe camp	14	7.7
Personal tent	63	34.6
Traditional village house	69	37.9
Personal tent or traditional village house	30	16.5
Deluxe camp or personal tent	3	1.6
Deluxe camp or traditional village house	3	1.6
Total	182	100.0

Table 4 summarizes responses from the respondents when asked to rank which services could be provided or improved.

Table 4: Ranking of Services or Opportunities for Improvement (Percent of respondents according to three categories of importance or priority)

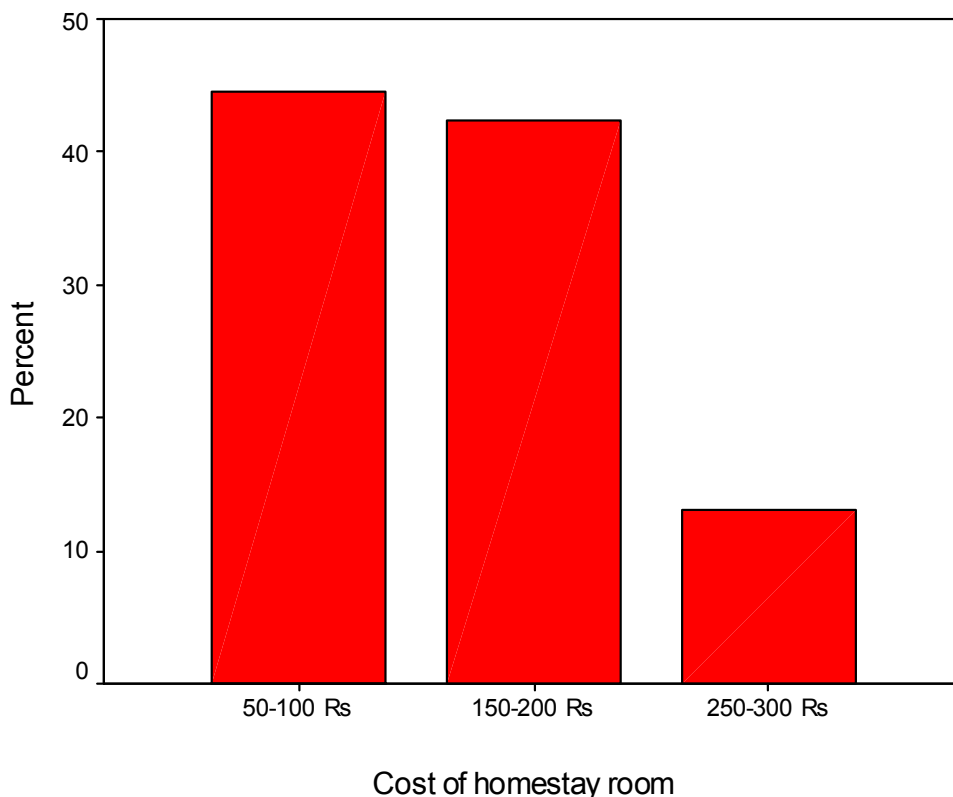
Tourism-related Activities Which should be Improved	Sample Size	Priority Ranking by Respondents (expressed as percent of responses tallied)		
		Highest	Intermediate	Lowest
On-site interpretation	39	56.4	23.1	20.5
Local guiding	49	40.8	38.8	20.4
Improved toilet	76	72.4	9.2	18.4
Wildlife viewing	54	53.7	14.8	31.5
Handicrafts	51	47.1	5.9	47.1
Home-stays	64	59.4	18.8	21.9
Local restaurant	41	34.1	14.6	51.2
Local food	69	65.2	13.0	21.7

From the number of responses to each item, these services can be roughly ranked in the relative importance the respondents attached to the need for improvement. From highest to lowest, these are: 1 - improved local toilets (highest overall ranking); 2 - local food; 3 - availability of homestays; 4 - wildlife viewing opportunities; 5 - local guiding; 6 - availability of handicrafts; 7 - on-site interpretation; and 8 - local restaurant (lowest overall ranking).

Figure 4 indicates willingness to pay for homestays by 137 respondents who expressed an interest in

this community-based service - namely having the opportunity to stay in local homes while on trek. Not surprisingly, professionals showed greater willingness to pay more money for a room than students (Chi-Square 8.836, df 2, $p < 0.012$).

Figure 4: Homestay Room Charge Visitors Would Be Willing To Pay (N = 137)



Respondents were then asked specific questions about what kind of facilities they would like to see in those homes developed for offering homestays. Eighty percent would prefer a local Ladakhi toilet over western or other designs (N = 148). In terms of the type of food that should be served, 70% wanted a local Ladakhi diet, and 29% desired a mixture of Ladakhi and Indian food. Only 0.6% wanted a predominantly western diet (N = 164). Regarding furnishings, 44% requested some kind of light, 51% wanted beds and 48% bed-sheets, 22% felt a table was necessary, and 53% noted that hot water should be provided.

Responses concerning the source of energy emphasized environmentally friendly and the most feasible options available within the Ladakhi context. Thus, 84% and 66% of the 178 respondents respectively do not like to see wood or dung used. Twenty-five percent wanted natural gas, while 80% of respondents felt that solar-electricity should be used. Only 2% saw mini-hydro as a possible option for Ladakh's obviously arid environment.

Visitors were asked if there should be an entry fee to the park, and if so, how much such a fee should be. With 159 persons responding to this question, a mere 9% felt that a fee should not be charged. Figure 5 shows what they would be willing to pay in terms of a fee. There was no difference between students or professionals in the amount each said they would be willing to pay as an entrance fee.

Table 5 indicates what respondents most enjoyed during their visit. The landscape or scenery, Ladakhi culture (especially the hospitality of the local people), and nature or wildlife viewing were ranked as the

most attractive features.

Figure 5: Park Entrance Fee Scale “Willingness to Pay” (N = 141)

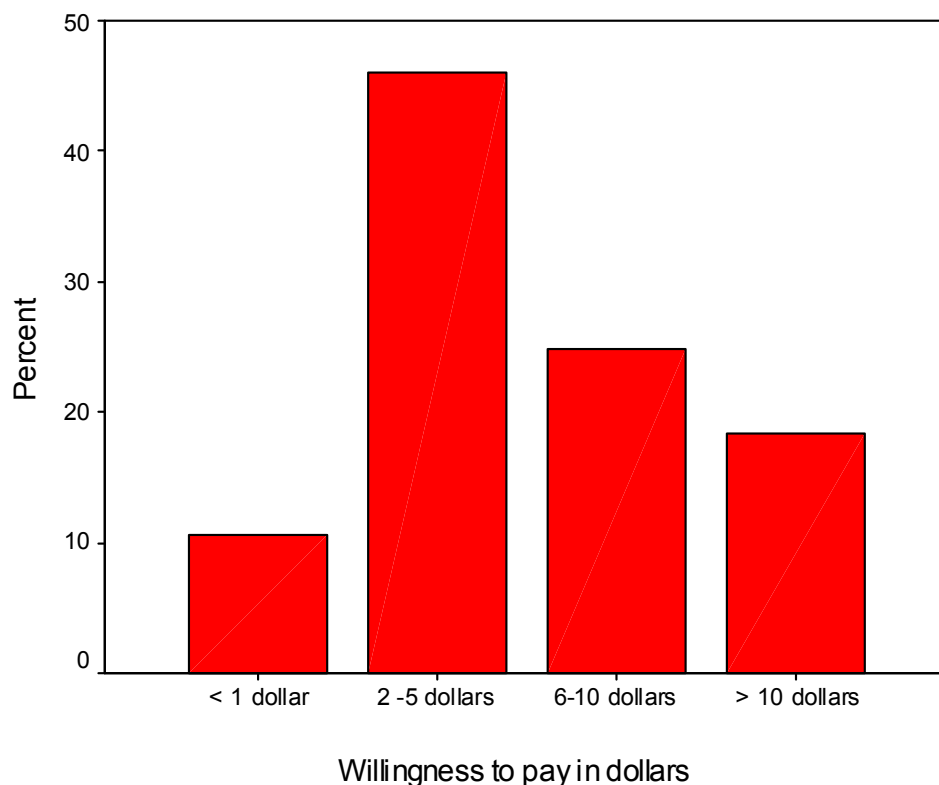


Table 5: Factors Visitors Listed as Their “Most Liked” Experiences

Feature	No of times listed by Respondents	Percent
Landscape & scenery	106	30.4
Nature & wildlife	55	15.8
People & culture	110	31.5
Festivals and religion	21	6.0
Trekking & adventure	13	3.7
Other	44	12.6
Total	349	100.0

Table 6 indicates what visitors most disliked, the most important being litter, garbage and dirty campsites, traffic and pollution (especially in Leh), and visitor congestion and cultural insensitivity. Other concerns centered about bad toilets, poor food hygiene and unsanitary conditions. The “other” category consist of miscellaneous items, such as lack of signage, maps or information on trail condition, an inability to communicate with local people because of language barriers, non-traditional buildings, too many check-posts or military presence, and conditions of poverty. Interestingly, students complained more often about visitor congestion (27.9%) than professionals (10.3%) or about rude shopkeepers or drivers (6.6% versus 1.7%). However, professionals (21.4%) were more concerned about traffic and vehicular pollution than students were (9.8%).

Table 6: Experiences which Visitors reported Disliking

Feature	No of times listed by respondents	Percent
Litter, garbage & unclean Campsites	43	24.2
Traffic & vehicular pollution	31	17.4
Visitor congestion & westernization	29	16.3
Other	30	16.9
Poorly kept toilets	17	9.6
Unsanitary conditions & poor hygiene	16	9.0
Rude shopkeepers or drivers	6	3.4
Lack of hot water	5	2.8
Poorly maintained or difficult trails	1	0.6
Totals	178	100

Seventy percent of visitors reported seeing some wildlife, mostly birds, marmots, and blue sheep, along with lizards, a few foxes and some yak. Many listed blue sheep as a deer, while others wrote “furry unidentified animals,” or expressed their disappointment at not seeing any wildlife. This suggests the need for interpretative materials, including signage and an informational brochure on the park’s trails, amenities, locales for making wildlife sightings, and scenic opportunities.

4. Conclusions and Recommendations

In conclusion, this visitor market and attitude survey provided highly useful baseline information for planning more effective initiatives aimed at increasing community benefit from tourism in selected rural areas of Ladakh. SLC and its partners will initiate additional CBT activities early in 2002, taking advantage of those opportunities that best preserve the environment and a quality visitor experience, while learning from this survey and the importance of a more tightly focussed visitor attitudinal and interest questionnaire.

We recommend a number of changes in the questionnaire aimed at minimizing misunderstanding among prospective respondents. For example, question No. 2 could be replaced with multiple choices of places already visited and proposed for visitation that respondents could select and tick. Question No 4 should be revised to read, “How did you reach Leh?,” while question 5 should specifically request the type of accommodation used while on trek versus in Leh. Question 6 is best dropped entirely. Question No. 7 should include columns for indicating daily expense while in Leh versus remote rural sites. Finally, questions (such as Question No. 9) in which the respondents are asked to rank their preference such be structured to enable the person to rank their answer on a scale of 1-5 (where 1 = not important and 5 = very important, as in the Likert Scale). A choice could be given for “other costs” under the homestay daily charge heading, clarifying the charge is for the room only with meals additional.

While this survey offered useful insight into the Hemis visitor’s trekking experience and interest in community-based ecotourism, a more tightly targeted survey is being proposed for next summer. Special attention needs to be devoted to Rumbak, Stok and the other undersampled areas, with the following planning objectives in mind:

- 1) Development of a marketing strategy (how to inform visitors about homestays, where, via which agencies/guidebooks etc.);

- 2) Suggestions for villagers and homestay operators on what types of facilities, fuel, accommodations, charges, etc. visitors would be expected to demand, for use in planning and training for homestays;
- 3) Obtain more specific feedback on the extent to which visitors would be willing to support (or pay for) CBT, and for which products or activities (not just whether they like the CBT local benefit concept, which most of course will say yes to); and
- 4) Prioritize reasons why visitors come to Ladakh and rural villages, in order to help design ecotourism activities that will encourage visitors to stay longer in Hemis National Park and local villages (as well as convincing locals of the importance of conservation).

For more information on The Snow Leopard Conservancy's programs linking snow leopard conservation, income generation and community-based tourism, visit our website: www.snowleopardconservancy.org or email us at: info@snowleopardconservancy.org or slcindia@sancharnet.in

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5. Appendix

5.1 Sample Questionnaire (available upon request)

5.2 Nationality of the Respondents Surveyed:

Nationality	Frequency	Percent	Cumulative Percent
French	45	24.2	24.2
British	31	16.7	40.9
German	24	12.9	53.8
Israeli	22	11.8	65.6
Austrian	10	5.4	71.0
American	9	4.8	75.8
Dutch	8	4.3	80.1
Canadian	5	2.7	82.8
Italian	5	2.7	85.5
New Zealand	4	2.2	87.6
Danish	4	2.2	89.8
Belgian	4	2.2	91.9
Swiss	3	1.6	93.5
Norwegian	2	1.1	94.6
Australian	2	1.1	95.7
Irish	2	1.1	96.8
Spanish	2	1.1	97.8
Czech	2	1.1	98.9
Japanese	1	.5	99.5
Scottish	1	.5	100.0
Total	186	100.0	